

CSBG Data Entry in ServTraq®

1/10/18

Background:

ServTraq® supports the entry and collection of CSBG household demographics for the purpose of generating the *CSBG 295 Characteristic Report*. As a result of the new 2018 CSBG data collection requirements, the **Weatherization Job Eligibility** entry process has been updated to synchronize with the *UA Application Entry*.

The procedure below applies to the **Utility Assistance Application** screen, and to the **Weatherization Job Eligibility Entry** screen in ServTraq®.

Procedure:

1. From the *UA Application* or the *Wx Eligibility form*, scroll to the Household Demographic section and select **Individual Household Member (CSBG Data)**.

The screenshot shows a web form titled "Household" with a sub-section "Household Information (CSBG)". At the top, there is a section "Choose a demographics entry type:" with two radio buttons: "Summary - Numbers per category" (unselected) and "Individual Household Members (CSBG Data)" (selected). Below this, the "Household Information (CSBG)" section contains several fields and checkboxes. "Family Type*" is a dropdown menu set to "SINGLE PARENT/FEMALE". "Tenancy*" is a dropdown menu set to "RENTED". Under "Other Income Type(s)*:", there are checkboxes for "ALIMONY OR OTHER SPOUSAL SUPPORT", "CHILD SUPPORT", "EITC", "PRIVATE DISABILITY INSURANCE" (checked), "SOCIAL SECURITY DISABILITY INCOME (SSDI)" (checked), "VA NON-SERVICE CONNECTED DISABILITY PENSION" (checked), "VA SERVICE-CONNECTED DISABILITY COMPENSATION" (checked), and "WORKER'S COMPENSATION". Under "Non-Cash Benefits*:", there are checkboxes for "AFFORDABLE CARE ACT SUBSIDY", "CHILDCARE VOUCHER", "HOUSING CHOICE VOUCHER", "HUD-VASH", "LIHEAP" (checked), "OTHER" (checked), "PERMANENT SUPPORTIVE HOUSING", "PUBLIC HOUSING", "SNAP", and "WIC".

2. In the Household Members section, click **Add Household Member** to make a new entry.
Note: You can populate *Individual Household Member* information from the most recent UA/Wx record onto the current UA/Wx eligibility record being entered. Simply click on the **Import Household Member** button to populate the demographic information. If the household composition has changed, click on the *pencil icon* to add edit or delete entries copied over.

Household Members

Add Household Member Import Household Members

	First Name	MI	Last Name	Date Of Birth	SSN
	MANUEL		LOPEZ	10/1/1967	776-45-4330
	JOSE		LOPEZ	9/25/1974	- -

3: Enter the household member demographics and click the **floppy disk** to save. Repeat step 2&3 until all household members have been added.

Household Members

Add Household Member Import Household Members

Add New Household Member

First Name:* ESTHER

MI:

Last Name:* MARTINEZ

Date Of Birth:* 1/8/1975

SSN: - - -

Gender:* FEMALE

Race:* MULTI-RACE

Relation to Applicant:* OTHER

Education Level:* 12+ SOME POST SECONDARY

Hispanic:* ☐

Health Insurance:* ☒

Health Insurance Type:* MEDICARE

Disabled:* ☒

Limited English:* ☐

Farmer:* ☐

Migrant Farmworker:* ☐

Seasonal Farmworker:* ☐

Military Status:* NEITHER ACTIVE MILITARY NOR VETERAN

Work Status: UNEMPLOYED (SHORT-TERM, 6 MONTHS OR LESS)

Disconnected Youth:* ☐

4. In the Household Income section, select **Individual Household Member Income (CSBG Data)**.

Household Income

Choose a Household Income entry type:

☐ Summary - Enter Total Monthly Income for the Household

☒ Individual Household Member Income (CSBG Data)

Income by Resident List

Add

	Recipient	Monthly Income	Income Type	Pay Period
	MANUEL LOPEZ	\$500.00	OTHER	BI-WEEKLY
	JOSE LOPEZ	\$233.30	OTHER	BI-WEEKLY

Total: \$733.30

- In the Income by Resident section, click **Add** to make a new entry. Click the **floppy disk** to save the entry.

Note: Only the household members added in step 3, will be listed in the “Recipient” drop down table.

Income by Resident List

Add

Add New Income Record

Recipient:*

ESTHER MARTINEZ

Income Type:*

UNEMPLOYMENT INSURANCE

Pay Period:*

MONTHLY

Supplied Amount:*

0

Monthly Income:*

800

Comment: